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P-CARD USER MANUAL

ADDING A GROUP NAME (GROUP CARD)

INTRODUCTION

A **Group Name** is the name of a “Group Card”, which is a P-Card issued to the agency for multiple users. Only one card is associated with a **Group Name**. Individual users are added as a Proxy Verifiers to the Group Card. NOTE: Some merchants require an individual’s identification to match the name on the Group Card at the point of sale. Also, online merchant forms may require a valid first name and last name. Contact Wells Fargo for more information and possible workarounds.

TO ADD A GROUP NAME

1. On the **Admin** screen, check the **Group Name** check box. (When **Group Name** is checked, the individual usernames will not be displayed. Uncheck the **Group Name** check box to view the individual users.)

Figure 1 - Admin selection for Group Name

The screenshot shows the Admin screen with the 'Add Group' tab selected. The 'Group Name' checkbox is checked. Below the checkbox is a table with columns: Edit, Group, Active, Created, and PCA/Index. The table contains two rows: 'Test' and 'Three Island Park'.

Edit	Group	Active	Created	PCA/Index
	Test	✓	11/15/2007	
	Three Island Park	✓	8/1/2007	23361

2. Click **Add Group**.
3. Type a **Group Name** and make sure the **Active Group** check box is checked.

Figure 2 - Group Name

The screenshot shows the Group Name form. The 'Group Name' field contains 'Office 23'. The 'Creation Date' field is empty. The 'Active Group' checkbox is checked. The 'Save' button is highlighted.

CC#	Active	Descrip
	<input type="checkbox"/>	

4. Click **Save** (on the top menu bar) before adding a credit card number.

TO ADD A CREDIT CARD NUMBER

NOTE: Only one card can be added to a **Group Name**.

1. Enter the last six digits of the P-Card number in the **CC#** field. NOTE: Do not use a placeholder (e.g., 999999). Actual credit card numbers must be entered into the application.
2. Select **Active** to make the card active in the P-Card application. The P-Card can be active for one group, although a group may have several card numbers assigned to it.
3. Enter a **Description** (recommended).
4. Click **Save** next to the card information.

ct | Logoff | Back | Save

☒ Active Group

Credit Cards

CC#	Active	Description	
123456	<input checked="" type="checkbox"/>	Office 23 Group Card	Save

Proxy Verifiers

Add

5. Click the down arrow of the **Proxy Verifier** menu and click the name to add.
6. Click **Add** to add the proxy verifier to the card.

Figure 3 - Adding Credit Card and Proxy Verifiers

Credit Cards

CC#	Active	Description	
123456	<input checked="" type="checkbox"/>	Group Card for Office 23	Edit Delete

Proxy Verifiers

Add

- ANDERSON MARILYN
- COX TAMARA
- EAGER KELLYE L
- HILTBAND LORRAINE
- HORNE RICHARD O
- KEATING LISA

TO ADD A DEFAULT PCA OR INDEX

Set up a Default Index or PCA for the group card to automatically fill in the PCA/Index code for the card in the Verifier's transaction grid. If your PCA/Index codes look up other fiscal codes, those other fiscal codes will also be automatically filled in.

1. Select **Choose Default PCA** or **Choose Default Index** (the choice displayed depends on your agency structure) to assign a default PCA or Index.
2. Click **Select** next to the PCA or Index needed. The **Default PCA/Index** will be added.

Figure 4 – Adding a Default PCA or Index

Code	Description	
01000	BOARD OF HEALTH	Select
02100	PUBLIC HEALTH DISASTER	Select
03000	FAMILY HEALTH GENERAL	Select

COMPLETED GROUP NAME

1. When the **Group Name** is complete, you can click **Back** to go to the **Admin** screen or click **Logoff**.

Figure 5 - Completed Group Card

CC#	Active	Description	
123456	<input checked="" type="checkbox"/>	Group Card for Office 23	Edit Delete

Proxy Verifiers
Del COX TAMARA
Del EAGER KELLYE L
Del LONDON SARA J

2. When going back to the **Admin** screen, uncheck the **Group Name** check box to view the individual users.